Alerts

1. Introduction

Alerts are created to notify you of an action that has been, or needs to be taken on a specific customer. Alerts can either be automatically created by the system or manually created by you.

Manual and system alerts can be assigned to a worker or unit. When a case is re-assigned to a new worker or unit, all alerts follow the case and will be re-assigned to the new worker.

ACE automatically generates certain alerts. Some alerts are generated by information received from interfacing with other systems, such as PMMIS and SDX. Other alerts are generated from actions taken in the system by you, or another worker.

You generate manual alerts to act as a reminder or follow-up for a particular action, or event, that is expected to happen in the future or to report a change. For example, if a customer indicates during a conversation that the customer may take their employer's health insurance (TPL), and open enrollment occurs in two months you would want to create an alert to follow up in 45-60 days.

Other examples of manual alerts are:

- **Customer expects a change in income.**
- **Customer expects a change in household composition.**

Alerts should be used to assist you; as you work your cases you may find additional reasons to create manual alerts.

It is recommended that you review the alerts assigned to your caseload a minimum of once daily.

There are two choices to select from when viewing the alerts.

- **Alerts By Person**
- **Alerts By Worker**

To access the alerts, go to the main menu and click **"Work"**. On the drop down list, click on **"Alerts"**, then select **"By Person"**.

Note: Alerts can also be accessed from the **"Work Management"** window.
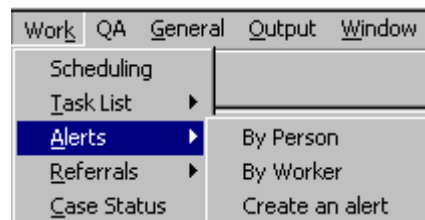
The **"Alerts by Person"** window will appear. If you do not have a case selected, the **"Find Person"** window will pop up and require you to select an individual. See the **Navigation Chapter** for instructions on how to find a person in ACE.
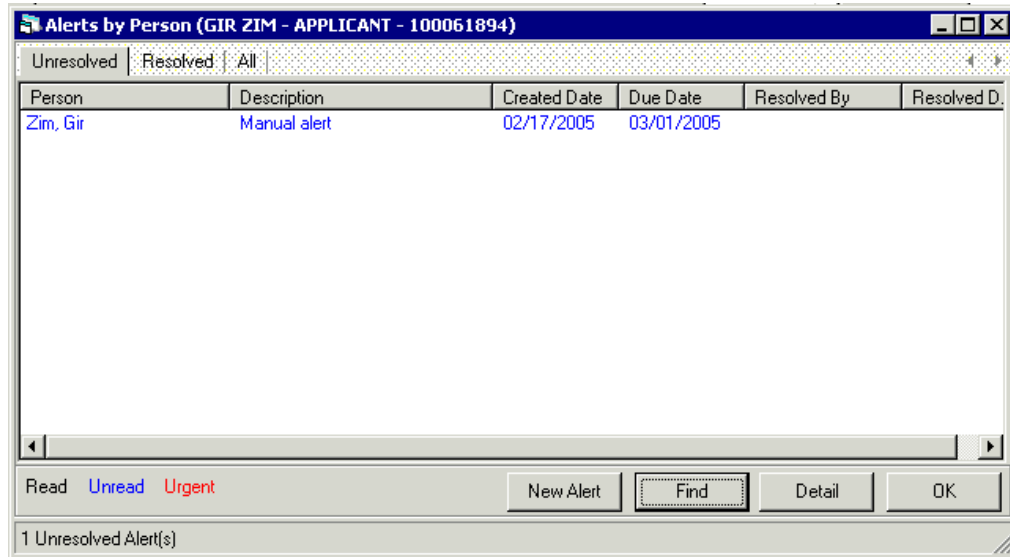

2. Alerts by Person

The **"Alerts by Person"** window is used to display all active and historical alerts. An active alert is one that has not yet been resolved by you.

ACE defaults to show only active alerts. To view all alerts (resolved and unresolved) click on the **"All"** tab.
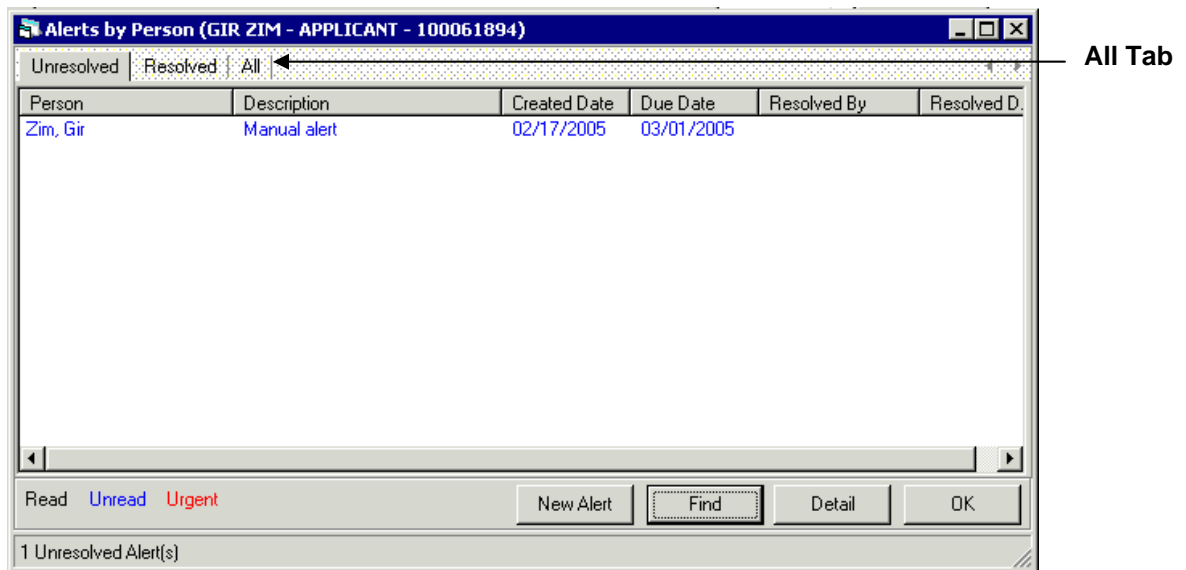
The **"Alerts by Person"** window displays general alert information, and allows you to select an alert to view in detail. The following fields are displayed:

- **Person**   Name of the customer for whom the alert is set.

- **Description**   Describes the alert.

- **Created date**   Displays the date the alert was created either by the system, or by a worker.

- **Due date**   Displays the date the alert is due.
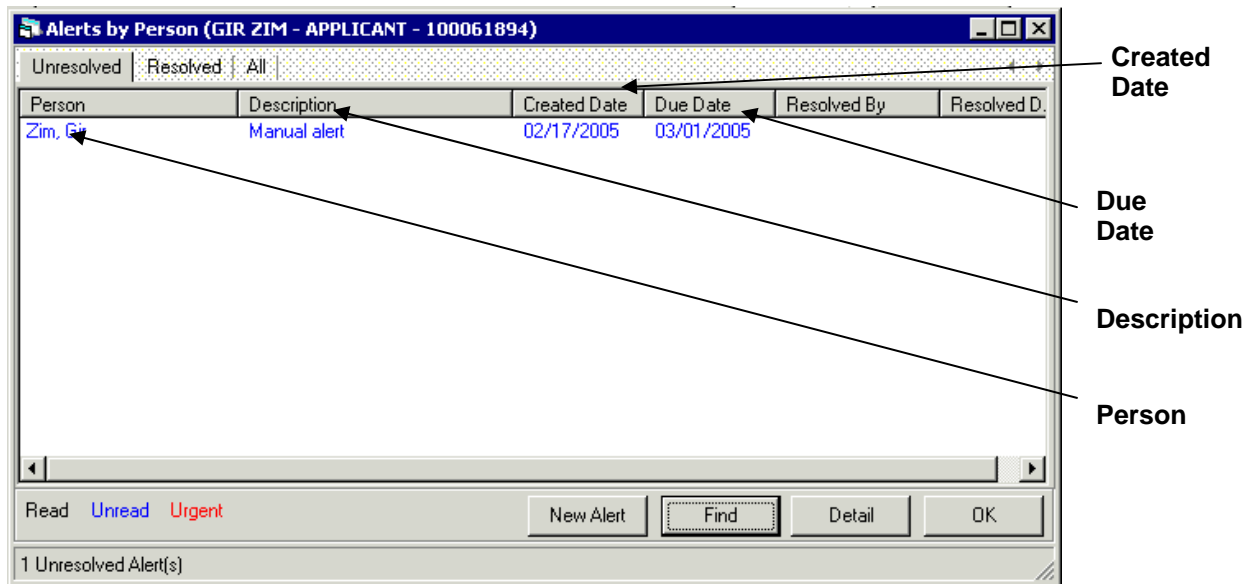
To view an alert for a specific customer, select the alert with a single click to highlight it then click the **"Detail"** button or simply double-click on the alert you wish to view. The **"Alert Detail"** window appears. If the selected alert has been resolved, the window is inquiry only, and no information can be modified. If the alert has not yet been resolved, certain information will be completed, as identified below:

- **Resolved by**   Displays the worker's name that resolved the alert. ACE will automatically populate this field when the **"Resolved"** check box is checked.

- **Resolution date** Displays the date the alert is resolved. ACE will automatically populate this field when the **"Resolved"** check box is checked.

- **Resolved (check box)** Allows you to specify that an alert has been resolved. To indicate an alert has been resolved, place your cursor over the box and click.

Alert Detail (HOMER SIMPSON - APPLICANT - 100061751)

Alert creation

Assigned to: RUDNICK, DAVID (DSRUDNIC) | Worker

Created by: RUDNICK, DAVID (DSRUDNIC) | Created date: 2/17/2005

Alert information

Alert description: Manual alert

Display begin date: 02/17/2005 | Due date: 03/01/2005

Action required:

Additional information:

This is one crazy alert.

Resolution Date

Alert resolution

Resolved by: RUDNICK, DAVID (DSRUDNIC) | Resolution date: 2/17/2005 | Resolved: ☑ — **Resolved**

Resolution comments:

This alert is not so crazy after all. — **Resolved By**

OK | Cancel

- **Resolution comments**   Allows you to enter comments regarding resolving the alert.

! | As with all the windows in ACE, the **"OK"** button saves the information and, closes the window. The **"Cancel"** button does not save any changes, and closes the window.

The **"Alerts by Person"** window has fields that are color coded:

- **Black** Read
- **Blue** Unread
- **Red** Urgent

When the alerts are read, the color will change from the blue, or red, to black, indicating you have read the alert. When the font color changes to black, it does not indicate any action taken other than you read the alert.
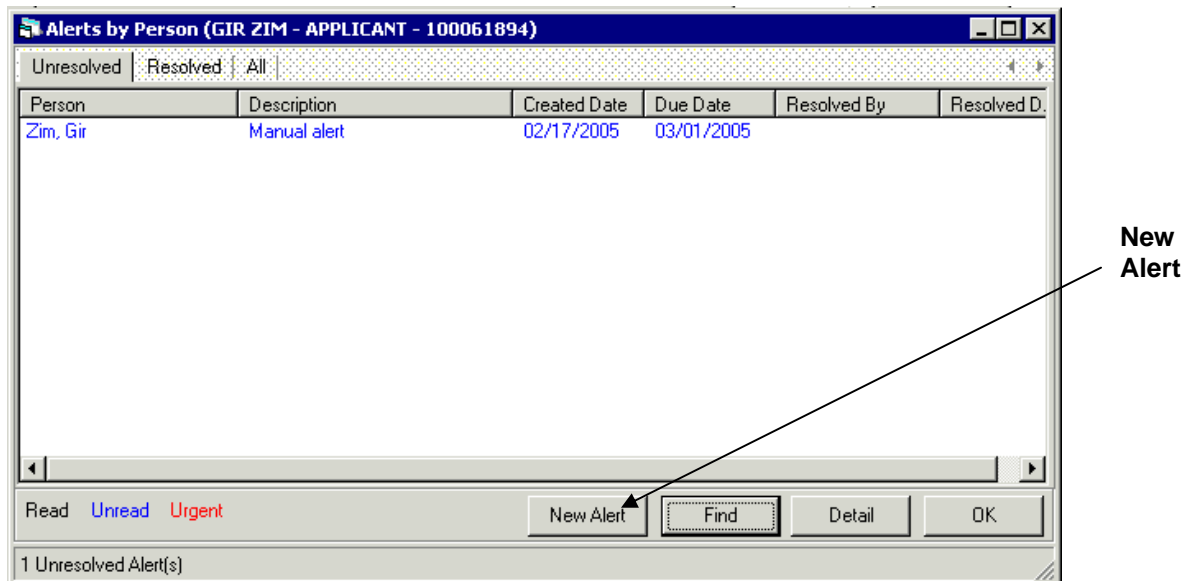
- **New alert** Allows you to create a new (manual) alert for this customer.

- **Find** Allows you to search for a different customer.

Color Coded

New Alert

Find
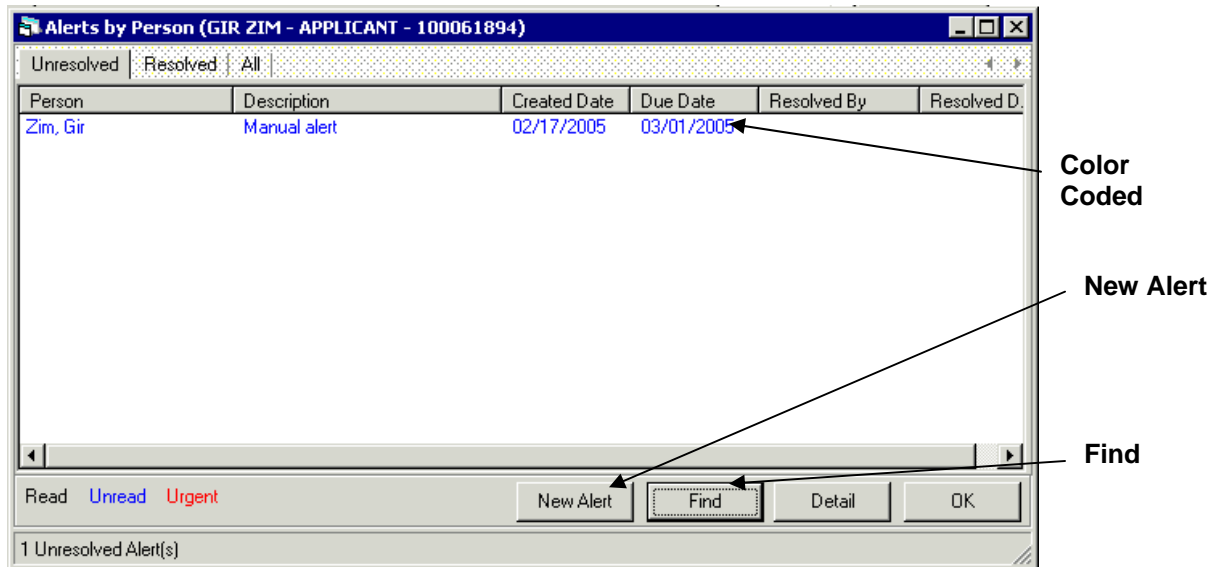
3. Creating a New Alert

To create a new manual alert for a customer, from the **"Alerts by Person"** window, click on the **"New Alert"** button.

The **"Add New Alert"** window will appear.

New Alert

The **"Add New Alert"** window is used to create an alert for a specific customer.

The following fields are seen on this window:

- **Alert Creation**   Assigned to
  Created by
  Created Date

- **Alert**   Alert Description

Information	Display begin date
	Due date
	Action required
	Additional information
• **Alert Resolution**	Resolved by
	Resolution date
	Resolved
	Resolution comments

Alert creation grid:

• **Assigned to**	By using the **"Worker"** button, you are able to assign the alert to a worker. For example, if Support Staff needs to convey information to the Eligibility Specialist regarding a specific case, the manual alert may be used. The **"About this Person"** chapter provides directions on determining who the worker is on

a specific case.

- **Created by** The system will default to your name as you created the alert.

- **Created Date** The system will default to the date the alert was created.

Alert information grid:

- **Alert Description** You may choose a description from the drop down box.

- **Display Begin Date** ACE allows you to choose the date the alert shall be displayed.

- **Due Date** The system determines the due date for all alert.

- **Action Required** When available, the system displays the actions needed to resolve the alert.

- **Additional Information**

This field allows you to type in any information you may need to complete the alert.

Add New Alert (GIR ZIM - APPLICANT - 100061894)

Alert creation

Assigned to: DAVID RUDNICK (DSRUDNIC)   [Worker]

Created by: RUDNICK, DAVID (DSRUDNIC)   Created date: 2/17/2005

Alert information

Alert description: Manual alert — **Alert Description**

Display begin date: 02/17/2005   Due date: 03/11/2005 — **Display begin date**, **Due date**

Action required: — **Action required**

Additional information:
Customer's income will be changing at the beginning of March. — **Additional Information**

Alert resolution

Resolved by: RUDNICK, DAVID (DSRUDNIC)   Resolution date: 2/17/2005   Resolved: ☑

Resolution comments:
Just kidding, the customer's income did not change as I had anticipated.

[Find] [OK] [Cancel]

! When you have entered all the information needed, click **"OK"**, which saves the information entered, and closes the window. **"Cancel"** does not save the information entered, and closes the window.

4. Alert Detail

To view the details of a specific alert, highlight the alert with a single click then click the **"Detail"** button or simply double-click on the alert to open it. The **"Alert Detail"** window appears. If the selected alert has been resolved, the window is inquiry only, and no information can be modified. If the alert has not yet been resolved, certain information can be modified, as identified below:

- **Resolved by**
- **Resolution date**

- **Resolved (check box)**
- **Resolution Comments**

Alert Detail (HOMER SIMPSON - APPLICANT - 100061751)

Alert creation

Assigned to: RUDNICK, DAVID (DSRUDNIC) [Worker]

Created by: RUDNICK, DAVID (DSRUDNIC)   Created date: 2/17/2005

Alert information

Alert description: Manual alert

Display begin date: 02/17/2005 ▼   Due date: 03/01/2005 ▼

Action required:

Additional information:

This is one crazy alert.

Resolved by

Alert resolution

Resolved by: _____   Resolution date: _____   Resolved: ☐

Resolution
Date

Resolved

Resolution comments:

Resolution
Comments

[OK]   [Cancel]

5. Resolving an Alert

Alert resolution grid:

- **Resolved By**   The system will default to the name of the worker resolving the alert.

- **Resolution Date**   The system will default to the date the alert was resolved.

- **Resolved**   To resolve the alert click in the check box.

- **Resolution Comments**   Once an alert is resolved, enter any applicable comments to the resolving of a referral.

Alert Detail (HOMER SIMPSON - APPLICANT - 100061751)

Alert creation

Assigned to: RUDNICK, DAVID (DSRUDNIC)   Worker

Created by: RUDNICK, DAVID (DSRUDNIC)   Created date: 2/17/2005

Alert information

Alert description: Manual alert

Display begin date: 02/17/2005 ▼   Due date: 03/01/2005 ▼

Action required:

Additional information:

This is one crazy alert.

Resolved by

Resolution Date

Alert resolution

Resolved by: RUDNICK, DAVID (DSRUDNIC)   Resolution date: 2/17/2005   Resolved: ☑   **Resolved**

Resolution comments:

This alert is not so crazy after all.

Resolution Comments

OK   Cancel

6. Alerts by Worker

The **"Alerts by Worker"** window works just like the **"Alerts by Person"** window.

The **"Alerts by Worker"** window is used to display all active and historical alerts. An active alert is one that has not yet been resolved by you.

Person	Description	Created Date	Due Date
Jones, Indiana	Manual alert	10/15/2004	11/30/2004
Simpson, Homer	Manual alert	02/17/2005	03/01/2005
Solo, Han	Disability Redetermination Due in 3 Months	09/02/2004	07/15/2004
Solo, Leia	Disability Redetermination Due in 3 Months	09/02/2004	07/15/2004
Zim, Gir	Manual alert	02/17/2005	03/01/2005

Worker Button